

IRS News Release

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IRS Announces Public Meeting of ACT, Names New Members

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WASHINGTON – The Advisory Committee on Tax Exempt and Government Entities (ACT) will hold a public meeting next month to present to the Internal Revenue Service recommendations on ways to improve operations regarding employee retirement plans, tax-exempt organizations, tax-exempt bonds and federal, state, local and Indian tribal governments.

The ACT was established in May 2001 under the Federal Advisory Committee Act to provide an organized public forum for the IRS to receive regular input on exempt organization and employee plan policy. The advisory committee consists of external stakeholders and their representatives who are appointed by the Secretary of the Treasury for two-year terms.

At the June 11 public meeting, six ACT project teams will present recommendations to the IRS Commissioner and senior leadership of the IRS' Tax Exempt and Government Entities Division (TE/GE). The projects are:

- Improving the Employee Plans Compliance Resolution System: A Roadmap for Greater Compliance
- The Appropriate Role of the Internal Revenue Service With Respect to Tax-Exempt Organization Good Governance Issues
- The Streamlined Closing Agreement for Tax-Exempt Bonds: A Cure for Common Violations
- Protecting Plan Benefits: Improving Governmental Defined Contribution Plan Compliance
- Tax Treatment of Cellular Telephones and Internet-Provider Allowances, and
- Governmental Relationship and Communication Between the Internal Revenue Service and Indian Tribal Governments.

The meeting is set for June 11 at 11 a.m. at 1111 Constitution Ave., N.W., Washington, D.C.

The IRS has named eight new members to the 21-member ACT. They join the 13 returning committee members. The new members are as follows:

Employee Plans

G. Daniel (Danny) Miller, Conner & Winter LLP, Washington.

Miller is a partner at Conner & Winters LLP and a member of that firm's Employee Benefits Practice Group. As a specialist in employee benefits for more than 30 years, he serves the needs of both large and small for-profit employers and the deferred compensation planning needs of a variety of non-profit employers, including churches and church denominational benefit programs. He is also a member of the Employee Benefits Committee of the Tax Section of the American Bar Association. Miller received his Juris Doctor from the Vanderbilt University School of Law.

Susan P. Serota, Pillsbury Winthrop Shaw Pittman LLP, New York

Serota is a Partner with Pillsbury Winthrop Shaw Pittman LLP and chair of the firm's executive compensation and employee benefits practice. She has broad experience in complicated tax issues and analysis, including defined benefit plans, hybrid plans, section 409A non-qualified deferred compensation arrangements and section 457 deferred compensation plans for tax-exempt and government entities. In 2006 and 2007 she served as the Chair of the American Bar Association Section of Taxation. Serota received her Juris Doctor from the New York University School of Law.

Exempt Organizations

Karin Kunstler Goldman, New York State Department of Law, New York

Goldman is an assistant attorney general in the Charities Bureau of the New York State Department of Law, where she has a wide range of responsibilities in the oversight of tax-exempt entities. She is responsible for the bureau's public education program and has also coordinated multi-state enforcement actions. She is a past president of the National Association of State Charities Officials (NASCO) and has been active in conducting educational seminars for officers, employees and volunteers of exempt organizations throughout the New York. Goldman holds a Juris Doctor from Rutgers Law School.

Jack B. Siegel, Charity Governance Consulting LLC, Chicago

Siegel is an attorney and certified public accountant with 25 years of experience in providing educational, consulting and legal services, focusing on nonprofit governance, financial matters and tax issues. As the principal of Charity Governance Consulting LLC, he focuses on board and staff training, governance, financial management and special projects. Siegel also has extensive experience in developing computer-based training software for lawyers, accountants and nonprofit directors and officers. He received an LLM in Tax from the New York University School of Law, a Masters of Management from the Kellogg Graduate School of Management, Northwestern University, and a Juris Doctor from the University of Wisconsin.

Government Entities: Indian Tribal Governments

Joe Lennihan, Sutin Thayer & Brown, Santa Fe, N.M.

Lennihan is an attorney with one of the largest law firms in New Mexico. He has worked in the Tax Unit of the Navajo Nation Department of Justice and served as general counsel to the Colorado River Indian Tribes. He has also served as Chief Counsel to the New Mexico Taxation and Revenue Department. Lennihan received his LLM from Georgetown University Law School.

Government Entities: Tax Exempt Bonds

Michael G. Bailey, Foley & Lardner LLP, Chicago

Bailey is a partner with Foley & Lardner LLP and specializing in tax-exempt finance and tax compliance. He has represented a wide variety of state and local governments and exempt organizations. He is currently the Chair of the Committee on Tax Exempt Financing of the Section of Taxation of the American Bar Association. From 1990 through 1997, he served in the Office of the Chief Counsel of the IRS, including as Counsel to the Associate Chief Counsel for Financial Institutions and Products. Bailey holds a Juris Doctor from the University of Chicago Law School.

Government Entities: Federal, State and Local Governments

Ruth Duquette, State of Michigan, Lansing, Mich.

Duquette is the Director of Payroll and Tax Reporting for the State of Michigan, where she is responsible for payroll processing and payroll tax reporting for all state employees (approximately 55,000 active employees and 75,000 W-2's) and for National Guard payments issued by the state's Department of Military and Veteran's Affairs. She is a certified public accountant with more than 14 years of experience in accounting, auditing, consulting and information systems in both the public and private sectors. Duquette holds a Bachelor of Business Administration from Davenport University.

Maryann Motza, State of Colorado. Denver

Motza is the State Social Security Administrator of Colorado, where she works closely with all state and local governments' employers and their financial and legal advisors to ensure compliance with federal Social Security, Medicare, and public pension system laws. She is a Past President of the National Conference of State Social Security Administrators (NCSSSA) and member of the IRS's Taxpayer Advocacy Panel (2004 through 2007). She also serves as a trustee on the Public Employees' Retirement Association of Colorado, the state's largest public pension system. Motza has a Ph.D. in Public Affairs from the University of Colorado.

ACT Members Continuing on the Committee

Employee Plans

- Susan D. Diehl, PenServ, Inc., Horsham, Pa.
- Dodi Walker Gross, Reed Smith LLP, Pittsburgh
- Michael M. Spickard, Summit Retirement Plan Services, Inc., Akron, Ohio
- Marcia S. Wagner, The Wagner Law Group, Boston

Exempt Organizations

- Bonnie Brier, The Children's Hospital of Philadelphia, Philadelphia
- Fred T. Goldberg, Jr., Skadden, Arps, Slate, Meagher & Flom, LLP, Washington, D.C.
- Mary Rauschenberg, Deloitte Tax LLP, Chicago
- Ana Thompson, The Charles and Helen Schwab Foundation, Palo Alto, Calif.

Government Entities: Indian Tribal Governments

- Dennis Puzz, Jr, Best & Flanagan LLP, Minneapolis
- Mary J. Streitz, Dorsey & Whitney LLP, Minneapolis

Government Entities: Tax Exempt Bonds

- Joan M. DiMarco, BondResources Partners LP, Philadelphia
- John G. Pasiecznyk, Dormitory Authority, State of New York, Albany, N.Y.

Government Entities: Federal, State and Local Governments

- Steven W. Hoffman, The Ohio State University, Columbus, Ohio

The project reports and proceedings of the June 11 meeting will be made public under the Federal Advisory Committee Act. The reports will be available on [IRS.gov](https://www.irs.gov).

Due to limited seating and security requirements, members of the public interested in attending the public meeting should call Cynthia PhillipsGrady to confirm their attendance. She can be reached at 202-283-9954 (not a toll-free call). Attendees must have photo identification and are encouraged to arrive at least 30 minutes before the session begins.